North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

User Account Management User Guide

Version 7

May 25, 2021

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If you have any questions, issues or requests, please go to the

CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

You can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 1. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.
Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code
   NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)
   For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
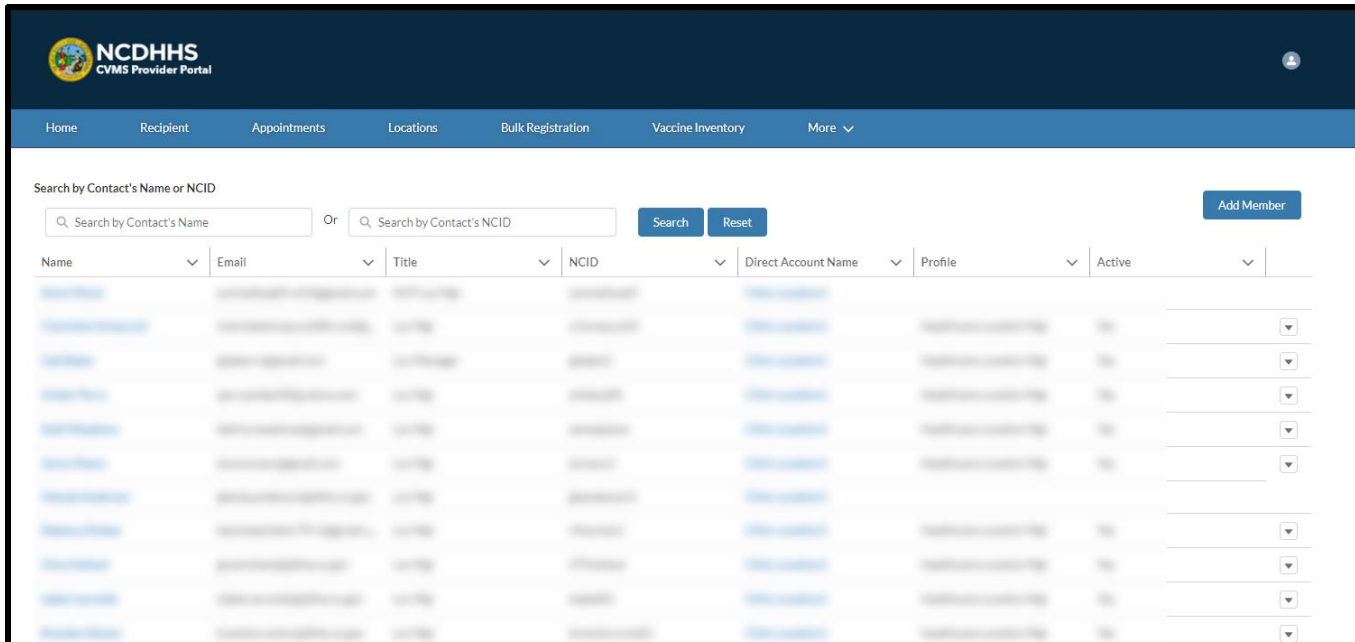3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview

In this user guide, we will review User Account Management. **User Accounts Management** will allow you to create and onboard new users to the CVMS Provider Portal. You will be able to:

- Search and create CVMS Provider Portal user accounts
- Edit user account details and profiles
- Add / remove locations to a user account
- Deactivate user accounts

The processes included in this user guide are for users with the **Healthcare Location Manager** profile only**.**

Additionally, you will need to:
- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers.
- Log in the CVMS Provider Portal with your NCID username and password at https://covid-vaccine-provider-portal.ncdhhs.gov

Now, let's get started!

Four User Profiles are Available

Healthcare Location Manager

The Healthcare Location Manager is an available user profile for the CVMS Provider Portal. This profile gives Healthcare Location Managers permission to access the following tabs: Home, Recipient, Appointments, Bulk Registration, Vaccine inventory, Shipments, Reports, Account Management, Organization Management, and Help & Information. Location Managers are in charge of managing user accesses for their location(s), manage the inventory, access reports, upload recipients, and everything a Healthcare Provider can do. There is always at least one user with a Location Manager profile per vaccine provider account.

Healthcare Provider

The Healthcare Provider is another available user profile for the CVMS Provider Portal. This profile gives Healthcare Providers permission to access the following tabs: Home, Recipient, Appointments, and Help & Information. This user can register a recipient, book an appointment, check the recipient in, log an administration of a Vaccine.

Healthcare Provider Read-Only

The Healthcare Provider Read Only profile gives users permission to access the following tabs: Recipient, Account Management, and Help & Information. This role allows a provider to check a recipient's information, vaccination and to create other users with a Read-Only profile.

Statewide Location Manager

This profile was created for surge staff, national guard resources, or other statewide support to reinforce any vaccine provider. This profile allows them to access all active vaccine provider locations in the State and is therefore limited to a select population.

Account Management Overview

The Account Management process enables Healthcare Location Managers to onboard staff or individuals that require access to the CVMS Provider Portal. Before starting this process, make sure to collect NCID usernames and valid email addresses for each user who requires a CVMS Provider Portal account.

1

Navigate to the Account Management tab in the CVMS Provider Portal.

Healthcare Location Managers can onboard authorized staff or individuals and provide access to the CVMS Provider Portal through the self-service Account Management tab.

2

Click Add New Member. Populate and save the HCP Provider Portal Contact record.

You will be required to enter the first name, last name, profile, NCID username and associated email address for each user.

Make sure to check that the NCID username was created using the associated email address.

3

After clicking Save, an automatic email will be sent to the users inviting them to sign into their CVMS Provider Portal account and start performing their applicable activities.

As a Healthcare Location Manager, you will be able to edit the assigned profile and NCID username if you need to correct any information.

For onboarding a large number of users to the CVMS Provider Portal, please visit the CVMS Help Desk Portal for further instructions on the HCP User Onboarding Template and the bulk user onboarding process. This will require opening a ticket in the CVMS Help Desk Portal.
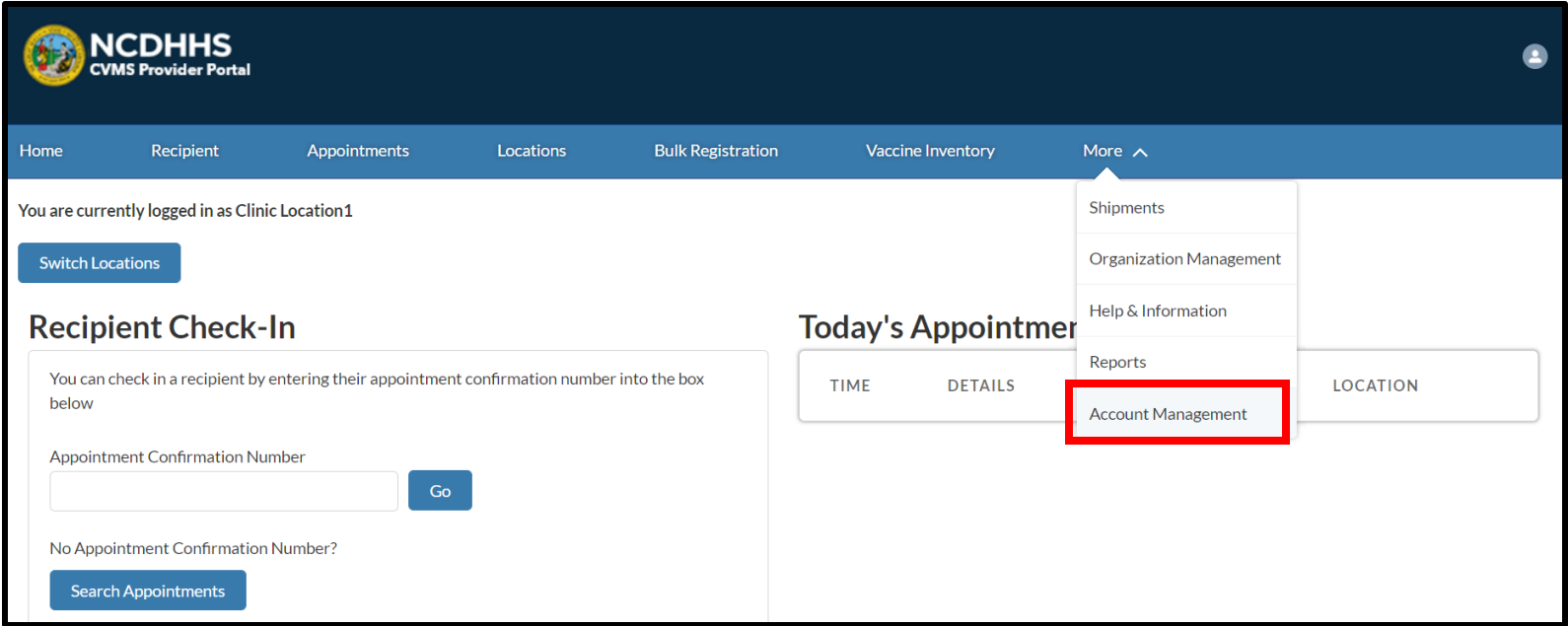
Create a New User Account

Before beginning the Account Management process, collect the first name, last name, email address, and NCID usernames for the individuals you are onboarding. You will need an NCID username for each person to onboard them to the CVMS Provider Portal.

1. From the homepage, click **MORE**

2. Click the **ACCOUNT MANAGEMENT** tab from the drop down

Audience

Healthcare Location Manager

Tips

You will only be able to onboard individuals to the Locations you have access to within your Organization.

Before you create a new CVMS Provider Portal account for an individual, search for them first to make sure that they do not already have one.

1. Search for the user by **NAME OR NCID USERNAME**

Audience

Healthcare Location Manager

Tips

Do not search both name and NCID simultaneously. The search must be done separately.

Once you confirm that the individual does not have an existing CVMS Provider Portal account, you can create a CVMS Provider Portal account.

1. Click **ADD MEMBER**

Audience

Healthcare Location Manager

After clicking **ADD MEMBER**, you will be directed to the Create HCP Portal Contact page. You will be asked to provide the individual's details.

1. Enter **FIRST** and **LAST** name used to register the NCID username

2. Enter **EMAIL ADDRESS** used to register the NCID username

3. Click the **ACCOUNT (LOCATION) NAME** search. Select **ACCOUNT** from the drop down

4. Select a **PROFILE** from the drop-down menu

5. Enter the **NCID USERNAME**

6. Click **SAVE RECORD**

Create HCP Portal Contact

* First Name

* Last Name

* Email

* Account Name

Search Accounts...

Title

* Profile

--None--

* NCID

Phone

Cancel   Save Record

Audience

Healthcare
Location Manager

Tips

The PROFILE will allow you to add a user as either a Healthcare Provider, Healthcare Location Manager, Statewide Location Manager, or a Healthcare Provider with read only access (used for those that need to view the system but not input data)

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Step 5 of 7: Search for Individual on the User List

Once you save the new HCP Portal Contact record, you will be directed back to the Account Management tab. You will be able to view the individual's name and NCID username on the list.

1. Click the **NAME**

2. After clicking the Name, you will be directed to the **CONTACT RECORD**

Audience

> Healthcare Location Manager

Tips

The Profile and Active columns will not update on the list until the individual logs into their CVMS Provider Portal account for the first time.

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Step 6 of 7: Review and Edit the User Contact Record

Each CVMS Provider Portal account has an HCP Portal Contact record. You will be able to review the information you provided and edit the information.

If you need to edit the email address on the Contact record, see the Appendix for further instructions.

1. Click the **PENCIL ICON** next to the field you wish to edit

2. Make the changes

3. Click **SAVE**

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Location Manager

Tips

By editing the Profile field, you will be updating the permissions for the individual's CVMS Provider Portal account.

If the e-mail address is edited, the system will automatically send the HCP invitation e-mail to the new e-mail address provided.

After the HCP Portal Contact record is created, an automatic email is sent to the email address provided

inviting the individual to sign into the CVMS Provider Portal account.

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Location Manager

> Hi Lisa,
>
> Welcome to the COVID-19 Vaccine Management System (CVMS).
>
> To get started, go to https://covid-vaccine-provider-portal.ncdhhs.gov   you will be redirected to the NCID sign on page, enter your NCID and password and select NCID Login. You will then be automatically logged into the CVMS Provider Portal.
>
> Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine
>
> Thank you,
> NC Department of Health and Human Services
> Division of Public Health

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Add Multiple Locations to a User

Step 1 of 3: Adding Multiple Locations to an Account

You will be able to provide access to additional locations to CVMS Provider Portal accounts you create.

1. From the HCP Portal Contact record, click **RELATED**

2. Under Related Accounts, click **ADD RELATIONSHIP**

Audience

Healthcare Location Manager

Tips

Remember, you will only be able to add locations you have access to in the CVMS Provider Portal.

| Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory |

Contact
Lisa Hall

Title	Account Name	Phone (2) ▼	Email
Location Manager	Crimson Skies		lisahall@mailinator.com

DETAILS   **RELATED**

Related Accounts (1)   Add Relationship

Account Name	Direct	Parent Account	
Crimson Skies	☑		▼

View All

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Step 2 of 3: Add Account Relationship

You will see the New Account Contact Relationship page appear.

1. Search for the Account (Location) in the search bar

2. Select the correct **ACCOUNT NAME** from the drop down

3. Click **SAVE**

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Tips

Enter at least three characters to see your search results.

Step 3 of 3: View and Remove Account Relationships

After clicking Save, the new account relationship will be reflected under the Related Accounts. You can always remove access to a location by clicking the **DROP-DOWN ARROW** for the account you wish to remove and selecting **REMOVE RELATIONSHIP**.

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Location Manager

Deactivate a User

Step 1 of 1: How to Deactivate a CMVS Provider Portal Account

This step should only be completed if you need to completely remove an individual's access to the CVMS Provider Portal. You will be able to deactivate their CVMS Provider Portal account from the Account Management tab. **To deactivate access for an individual for only a specific location, refer to slide 19 for how to edit or remove a user's relationship status at the location level**.

1. From the Account Management tab, search for the account using the **NAME OR NCID**
2. Click the **DROP-DOWN MENU** for the correct row
3. Click **DEACTIVATE**

Audience

Healthcare Location Manager

Tips

Before deactivating a CVMS Provider Portal account, use the NCID username as a unique identifier to confirm you found the correct account.
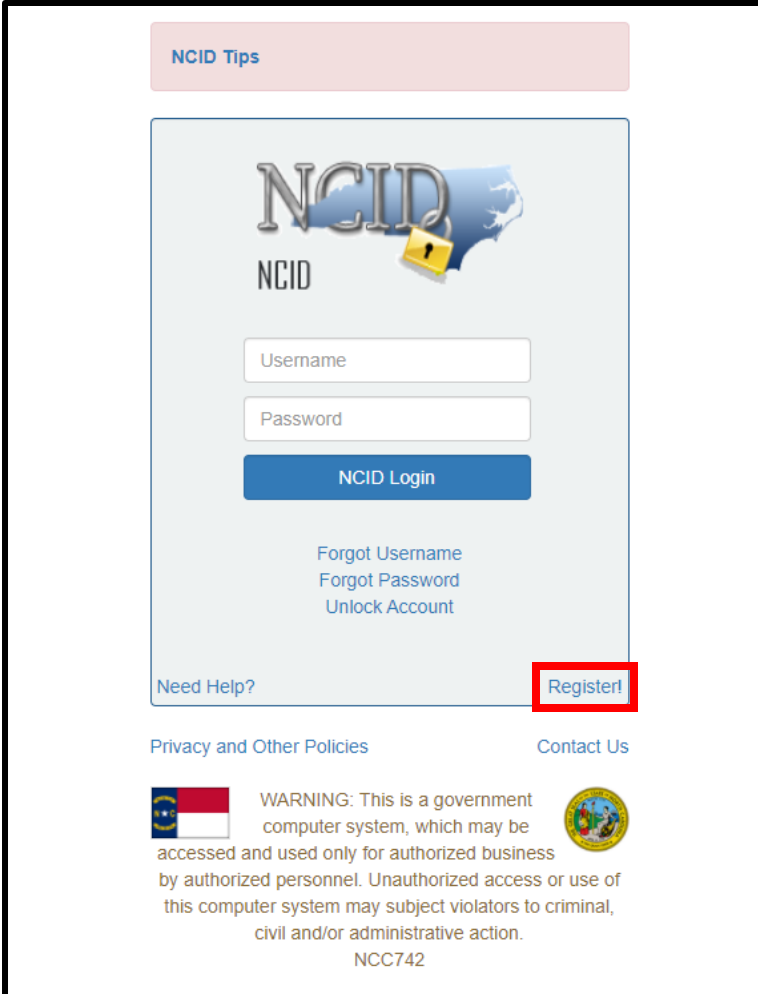
You will only be able to deactivate CVMS Provider Portal accounts that have the same direct Account (Location) as your own account. You can view your direct account on your HCP Portal Contact record.

Home	Recipient	Appointments	Locations	Bulk Registration	Vaccine Inventory	More ⌄

Search by Contact's Name or NCID

🔍 Search by Contact's Name   Or   🔍 Azalea.Troche1 ⊗   Search   Reset   Add Member

Name	⌄	Email	⌄	Title	⌄	NCID	⌄	Direct Account Na...	⌄	Profile	⌄	Active	⌄	
Azalea Troche		azalea.troche-acn@dhhs...		Healthcare Provider		Azalea.Troche1		Clinic ABC Loc 1		Healthcare Provider		Yes		▼

Deactivate 👤⊘

Appendix

How to Obtain an NCID

Instructions for a user to create an NCID:

- Navigate to https://ncid.nc.gov/
- Click **Register!** (in the bottom right corner of the blue box)
- Click **Business** user type option
- Complete the required fields to create an NCID
- Follow the steps to access your NCID account **and** create your security questions
- Once created, you will need to provide the exact first name, last name, email address, and NCID username used to create your NCID to the designated Location Manager or the Vaccine Coordinator so they can request access to the CVMS Provider Portal for you.

- If you have any questions **or need assistance in identifying the Location Manager or the Vaccine Coordinator for your location**, please submit all inquiries to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Editing the Email Address on the HCP Portal Contact Record

When a User Contact record is created, an automatic email is sent to the email address provided confirming their new CVMS Provider Portal account. It is very important that you enter the correct email address.

If you need to correct the email address after the record is created, the new email address **WILL NOT** receive an automatic email notification.

You will need to **MANUALLY PROVIDE** the individual with the **CVMS PROVIDER PORTAL LINK** and **LOG IN INSTRUCTIONS** to confirm their new account.
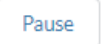
Additional Notes

Key Items:

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- *** Asterisks** are used to denote required information.

- A Toggle can be clicked to see selectable options.

- A Pen can be clicked to make edits to the field.

- Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more details on supported browsers, see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

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User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	2/14/2021	• Initial version		Azalea Troche, Darrell Lee, Kechia Scott
2	2/17/2021	• Renamed User Guide to reflect User Account Management • Removed slides related to Organization Management to a separate user guide	3, 5, 7	Kechia Scott
3	3/10/2021	• Updated Screenshots	All	Nicholas M. Rinz
4	3/12/2021	• Update Recipient Check-in • Updated Scheduling tab back to locations tab	9-11	Kechia Scott
5	5/5/2021	• Added tip about updated e-mail addressed automatically receiving HCP invitation e-mail	14	Darrell Lee
6	5/14/2021	• Note added about Profile types	6, 12	Darrell Lee
7	5/25/2021	• Updated to instruct location managers to only deactivate users that they are sure are no longer active	21	Darrell Lee

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